

## Success Story

# Conquering complexity with intuitive, cloud-based ERP

Roman Catholic Diocese of Portland

“Thanks to the insight we have in Sage Intacct, we’ve provided new value-added services and information to our department directors that we were never able to offer before. Sage Intacct dimensions really are life-changing, and the system’s reporting possibilities are endless. There isn’t anything it can’t do.”

### Laurie Downey

Controller, Roman Catholic Diocese of Portland

### Company overview

Established by Pope Pius IX in 1853, the Roman Catholic Diocese of Portland spans the entire state of Maine, serving a population of 279,159 Catholics. In addition to 58 parishes, the nonprofit organization manages 10 elementary schools, one high schools and 65 cemeteries, along with several subsidized housing units and a foundation.

### Executive summary

Previous software:

- LOGOS Accounting
- USL Financials

### Results with Sage Intacct

- Gained timely, accurate in-sight into parish operations.
- Improved overall finance efficiency by 10%.
- Avoided ~60 hours annually on consolidations and reporting.
- Software paid for itself in the first year.



### Company

Roman Catholic Diocese of Portland

### Location

Maine, US

### Industry

Nonprofit

### Sage Products

Sage Intacct



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### **Conquering complexity with intuitive, cloud-based ERP**

The Roman Catholic Diocese of Portland serves parishioners across the entire state of Maine through over 100 distinct entities, including parishes, schools, cemeteries, housing projects, a foundation, a magazine, a pension trust, and other ministry programs. This complex organization previously struggled to manage its financial reporting because a central finance team used one accounting system at the main chancery office, while the parishes used another software program with separate databases for each entity.

Consolidating annual financials had become a massive undertaking, with the team spending around 15 hours logging in and out of these databases to manually export data for every single parish and import it all into the main system. And since that software could not support the diocese's reporting needs, they prepared most reports in cumbersome Excel spreadsheets.

The team eventually went in search of a single, cloud-based financial system that could support the entire organization, including 70 bookkeepers in the field. "Initially, we didn't think we would find a solution that could work for all of our entities, because they're each so different. But, when we found Sage Intacct's cloud ERP software, we knew the whole organization needed to make the switch," said Laurie Downey, controller at the Roman Catholic Diocese of Portland. "Sage Intacct has everything we were looking for – the ability to do real-time consolidations, robust reporting with drill-down capabilities, a much more flexible general ledger, strong internal controls with various levels of user access, and an intuitive interface for people of all technical abilities," said Laurie.



Roman Catholic Diocese of Portland saves at least four hours each month, thanks to powerful report writer and scheduler Sage Intacct.

### **Streamlining consolidations and reporting for multi-entity financials**

The diocese worked with Sage Intacct partner, CliftonLarsonAllen, to complete a thoughtful implementation across all entities. The finance team estimates that the software freed up about 10% of their time by streamlining manual processes surrounding report preparation, consolidations, accounts payable, and expense management. Laurie shared, “We used to consolidate only at the end of the year when we had our annual audit, because it took us so much time to pull in data from all the remote entities, but with Sage Intacct the information is just there. We can do all of our entity-level and global reporting right in the core system, and can consolidate everything efficiently each month without spending hundreds of hours on the task over the course of a year.”

Laurie says she personally saves at least four hours each month, thanks to Sage Intacct powerful report writer and scheduler, which automatically prepares and emails the relevant reports to department directors, program directors, and other stakeholders throughout the diocese. “The Catholic Foundation of Maine has complicated reporting requirements for its temporarily restricted, permanently restricted, and net asset funds, but Sage Intacct flexible general ledger effortlessly supports it all through dimension values – I just click a button and the foundation’s financial reports run perfectly in Sage Intacct,” mentioned Laurie.

Sage Intacct also eliminates a lot of data entry and paperwork, especially for the organization’s smaller parishes, which now put the time they save into providing better reports to their finance councils and delivering value-added services for parishioners. In particular, Sage Intacct allocations and document attachment capabilities simplified the diocese’s accounts payables process by automating the creation and balancing of inter-company transactions, and eliminating two filing cabinets of paper invoices. An add-on solution from Sage Intacct Marketplace partner ExpensePath also saves the finance team one full day of expense reimbursement processing each week.



### **Gaining unprecedented operational insight through financial transparency**

One of the best perks the diocese has enjoyed since making the switch is access to standardized, accurate, and timely financial information for easier entity oversight. Sage Intacct dimensions capture more content so the organization can analyze real-time performance by various drivers without having to manage a complex chart of accounts. Users simply “tag” transactions with the relevant vendor, employee, location, or project, and department managers and entities – as well as the central finance team – can always see exactly how they’re doing and adjust as needed.

One such example relates to parish Christmas fairs, offertory programs, and other fundraising events. Now that all expenses and income related to these projects are captured in Sage Intacct, each parish knows how well they’re raising money, and the diocese’s development director finds ways to help them be more efficient and effective. The organization even uses statistical accounts to track electricity and fuel consumption in Sage Intacct, so the director of property management can leverage economies of scale across all the entities to get better discounts on utilities.

“This type of information was never available to us before Sage Intacct, and as we’ve significantly increased our financial visibility, we’re finding that having real-time updates from our parishes allows us to better support them in proactive versus reactive ways,” noted Laurie.

